



Electronic Document Access (EDA) 1

User Account Administration



“Fly-in” Action
(*Continue to Page Down/Click on each page...*)



Process Requests

How to Process Requests...

- ✓ Password Reset Request
- ✓ Support Contractor Access Request



EDA notifies the **Primary** EDA POC by e-mail when user account administration activity occurs. The e-mail will indicate the action required by the EDA POC.



E-mail to EDA POC for Action³

Pending Password Reset E-mail Notification

Subject: EDA Password Reset Request for kay flaherty

This message was generated automatically. Please do not respond to this message.

kay flaherty has requested an EDA password reset.

To process this request:

- * Access EDA Account Administration.

Username/Password access:

https://eda.ogden.disa.mil:643/pls/user/eda_adm.mainMenu

Certificate/CAC access:

https://eda.ogden.disa.mil:443/pls/cert/eda_adm.mainMenu

- * Under Requests, click Password Resets.

- * Contact the user, verify the request, and take appropriate action (Approve or Delete).

For more information on EDA POC activities, please see the EDA User's Guide available online at

<http://eda.ogden.disa.mil/>



E-mail to EDA POC for Action⁴

Support Contractor Access Requests

Harry D. Keeshond Jr. has requested access in EDA. Please process this PENDING government support contractor access request.

EDA POCs (Point of Contact) are accountable and responsible for authorizing user access to EDA.

To Authorize:

Contact the user to verify request

- * Verify user identity.
- * Verify user submitted Access request.
- * Confirm user affiliation with Service/Agency/Organization/Company.
- * Validate the User Type - Government Support Contractor
- * Validate user document access requirements (based on "Need to Know")

Note: You may wish to retain this e-mail for audit purposes.

----- ACCESS REQUEST INFORMATION

Name: Harry D. Keeshond Jr.
Telephone: 703-881-6314
International Telephone:
E-mail Address: harry.keeshond@navsea.navy.mil
Request Access To:
 DoDAACs:
 N12345 Issue
 Contracts:
 DAAJ0987655443

----- To process this request:

- * Access EDA Account Administration.
 Username/Password access:
 https://xxxx.xxx.xx.xxx.xxx:xxxx/pls/user/EDA_ADM.mainMenu
 Certificate/CAC access:
 https://xxxx.xxx.xx.xxx.xxx:xxx/pls/xxx/EDA_ADM.mainMenu
- * Under Requests click Government Support Contractor Access.
- * Process accordingly (add, modify, delete). Follow EDA POC procedures as detailed in the EDA User's Guide.

Password Reset Request Queue



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Electronic Document Access
Next Generation

Account Administration

POCB0reo Flaherty - Today is Jan 03, 2006
[EDA User's Guide](#)

[Document Selection](#) > Account Admin

Refresh

Registrations

[Pending](#) (6) [Approved / Waiting User Logon](#) (4)

Requests

[Password Resets](#) (2) [Approved / Waiting User Logon](#) (1)
[Government Support Contractor Access](#) (1)

Accounts

[Search, View, Modify, Delete](#)

Miscellaneous

[EDA POC Assignments](#)

Process a Password Reset

Click **Password Resets (#)**

(#) - Number of Requests waiting for action

For more information about the DOD EDA Web Page, call the help desk at (866)618-5988, (801)605-7095 or DSN 388-7095, or send email to:
cscassig@ogden.disa.mil



Alphabetic
By Name
Last, First

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Password Reset Requests

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[EDA User's Guide](#)

[Document Selection](#) > [Account Admin](#) > Password Reset Requests

Total Requests: 2

Refresh

Total Registrations in Queue

*Time displayed in CST

Name	Status	CSA	Requested	Telephone	E-Mail	
Flaherty, AF POC	pending	Acquisition	03-JAN-2006 12:04	999 999 9999	carol.flaherty@eds.com	Delete
Flaherty, kay	pending	ACC	03-JAN-2006 11:59	888 888 8888	carol.flaherty@eds.com	Delete

Refresh

[Return to EDA Document Selection Page](#)

Click
Name

Queue may be re-sorted by column.
 Click column heading to re-sort queue.

Password Reset Approval
Contact User
Verify they submitted the request

Process a Password Reset

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Password Reset -
Verify/Approve
Request
DEMOUSER11

POCB0reo Flaherty - Today is Jan 03, 2006
[EDA User's Guide](#)



[Document Selection](#) > [Account Admin](#) > E

Make updates/corrections (as necessary)

Make updates if necessary (* required).

Username: DEMOUSER11

Name: Flaherty, kay

C/S/A Major Command: ACC

Enter either the Telephone or E

*Telephone: 888 888 8888 Ex

*Intl Country Code and Telephone:

DSN:

*E-Mail Address: carol.flaherty@eds.com

Requested: 03-JAN-2006 11:59 CST

EDA automatically sends an
Approval Password Reset
Notification to the user with
instructions for activation

Check **Statement of Accountability** stating
I have contacted the User and verified Identity

☐ Statement of Accountability - I have contacted the User and verified Identity

Cancel

Approve This Request

Click **"Approve this Request"**
to Process/Accept Password Reset

[Return to Request List](#)

[Return to EDA Document Selection Page](#)

Password Reset Approval



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Account Administration

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[Document Selection](#) > Account Admin

Refresh

Registrations

[Pending](#) (6) [Approved / Waiting User Logon](#) (4)

Requests

[Password Resets](#) (2) [Approved / Waiting User Logon](#) (0)
[Government Support Contractor Access](#) (1)

Accounts

[Search, View, Modify, Delete](#)

Miscellaneous

[EDA POC Assignments](#)

Requests

[Approved / Waiting User Logon \(#\)](#)

Once the user activates their account by logging into EDA, the request is automatically cleared from the approved queue.

DO NOT Delete from the 'Approved' queue.

After APPROVAL of a Password Reset,

EDA sends an password reset approval e-mail notification to the user with instructions to activate their Password.

EDA places the 'approved' request into a separate queue **Approved / Waiting User Logon (#)**.

Approvals are valid for 7 Days.



Delete a Password Reset Request





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Password Reset Requests

[Document Selection](#) > [Account Admin](#) > Password Reset Requests

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[EDA User's Guide](#)

Total Requests: 2

*Time displayed in CST

<u>Name</u>	<u>Status</u>	<u>CSA</u>	<u>Requested</u>	<u>Telephone</u>	<u>E-Mail</u>	
Flaherty, AF POC	pending	Acquisition	03-JAN-2006 12:04	999 999 9999	carol.flaherty@eds.com	Delete
Flaherty, kay	pending	ACC	03-JAN-2006 11:59	888 888 8888	carol.flaherty@eds.com	Delete

[Return](#)

For more information, call 1-800-5988, (801)605-7095 or DSN 388-7095, or send email to: [cscassig](#)

Password Reset Rejection/Denial

Delete Request from List

Delete
from Queue

User's password remains *unchanged*

Process Contractor Access R

How to Process Contractor Access Requests...



Support Contractor Access Requests



EDA notifies the **Primary** EDA POC by e-mail when user account administration activity occurs. The e-mail will indicate the action required by the EDA POC.



E-mail to EDA POC for Action¹¹

Support Contractor Access Requests

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Note: You may wish to retain this e-mail for audit purposes.

----- ACCESS REQUEST INFORMATION

Name: Harry D. Keeshond Jr.
Telephone: 703-881-6314
International Telephone:
E-mail Address: harry.keeshond@navsea.navy.mil
Request Access To:
 DoDAACs:
 N12345 Issue
 Contracts:
 DAAJ0987655443

----- To process this request:

- * Access EDA Account Administration.
 Username/Password access:
 https://xxxx.xxx.xx.xxx.xxx:xxxx/pls/user/EDA_ADM.mainMenu
 Certificate/CAC access:
 https://xxxx.xxx.xx.xxx.xxx:xxx/pls/xxx/EDA_ADM.mainMenu
- * Under Requests click Government Support Contractor Access.
- * Process accordingly (add, modify, delete). Follow EDA POC procedures as detailed in the EDA User's Guide.

Govt Support Contractor ¹²

Definition



Support Contractor is an individual **CONTRACTED** by the U.S. Government to perform a task/function within the U.S.

~~Government~~

Support Contractor's Contract query access is restricted within EDA by:

- DoDAACs (Admin, Pay or Issue) where activities are performed **AND/OR**
- Contract Number(s) of activities

DCAA, DCMA, DFAS, & DISA contractor contract queries are not r
These communities do not require DoDAACs or Contract Numbers

EDA offers Support Contractors the capability to request changes/additions to their EDA access using a Support Contractor Access Request

EDA notifies the responsible EDA POC for approval

Process a Govt Contractor Req



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Account Administration

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[EDA User's Guide](#)

[Document Selection](#) > Account Admin

Refresh

Registrations

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Requests

[Password Resets](#) (2) [Approved / Waiting User Logon](#) (0)

[Government Support Contractor Access](#) (1)

Accounts

[Search, View, Modify, Delete](#)

Miscellaneous

[EDA POC Assignments](#)

Support Contractor Access Request

Click **Support Contractor Access**

(#) - Number of Requests waiting for action

For more information about the DOD EDA Web Page, call the help desk at (866)618-5988, (801)605-7095 or DSN 388-7095, or send email to:
cscassig@ogden.disa.mil



Access Request Queue



Department of Defense Electronic Document Access

Access Requests List

[Account Selection](#) > [Account Admin](#)

Alphabetic
al
By Name
Last, First

There are 5 requests.

Total Support Contractor Access

Name	<u>CSA Name</u>
AGENT, GOVERNMENT	Defense Commissary Agency (DECA)
JONES, STEVE	NGB
JONES, STEVEAGENT3	DCMA
SHAW, LION	Defense Commissary Agency (DECA)
SMITH, DOUG	AFMC

Sort by C/S/A Name

Refresh

Click
"Name"

Contractor Access Request



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[Document Selection](#) > [Access](#)

Both current and requested* entries are displayed

Flaherty, Fran J IV
FA1111

DoDAAC

Activity

F12345

Issue

D12345

*

Issue

Approve

Reject

Add more rows...

For more information about the DOD EDA Web Page, call the help desk
cscassig@ogden.disa.mil

VERIFY - Support Contractor Access Request

Based on **"Need to Know"**

Definition: *Need-to-Know* - The principle by which users are only granted access to the information, assets, and resources necessary to perform their assigned job functions.

Valid DoDAAC(s) ??

Valid Contractor

Make updates/corrections to ACCOUNT

Blank out to Delete/Deny access
Type over to Modify/Update access
Add as required

Both CURRENT and REQUESTED* are displayed

Contractor Access Request



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[EDA User's Guide](#)

Access Requests

[Document Selection](#) > [Account Admin](#) > [Access Request List](#) > Access Requests

Both current and requested* entries are displayed. To delete, Blank out an entry.

[Flaherty, Fran j IV](#)
FA1111

DoDAAC

Activity

Contract

F12345

Issue ▼

D12345 *

Issue ▼

Approve

Reject

Add more rows...

Click **“Approve”** to UPDATE THE ACCOUNT
and ALLOW Access based on *screen*
entries

Click **“Reject”** to DELETE REQUEST.
The Account remains *unchanged*.
Request for *change* is denied

For more information about the DOD EDA Web Page, call the help desk.
cscassig@ogden.disa.mil

EDA automatically sends a notification
to the user with current access
information

EDM Document Access Request

How to Process EDM Document Request...

EDM/EFR Document Types:

- ✓ Contract Pay
- ✓ Vendor Pay



A user may notify their **Primary** EDA POC by e-mail or telephone to request EDM Document Access. Currently Contract Pay and Vendor Pay documents are available.

***First...General EDM
Information ...***



EDM/EFR Documents within EDA

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Electronic Document Management (EDM) facilitates the consolidation of DoD finance and accounting functions for DFAS. The Electronic File Room (EFR) system was established to provide electronic foldering, distribution, cataloging, and maintenance of the large amounts and diverse types of Contract and Vendor payment related documentation to the DoD community.

EFR is a web-based application that provides authorized DoD users view only access to DFAS EDM documents. DFAS EDM documents include all the EDM vendor and contract pay related documents.



EDM/EFR and User Authorization

EFR utilizes EDA's delegated *User Authorization* structure and process. This allows the EDA POCs to determine if their users require access to Contract Pay and/or Vendor Pay EDM documents. The EDA POC follows normal EDA access policies and C/S/A guidelines when granting EDM/EFR document access. The same guidelines for granting access to EDA contracts should be followed for access to EDM documents.

Contract Pay and/or Vendor Pay may be requested within EDA. Upon EDA POC approval and EDM/EFR credential set-up, EDA presents a link to **EDM/EFR Documents** on the Document Selection Screen.

EDM/EFR Access Process



The user requires a separate username/password to access EFR since EDM/EFR is a separate system and access credentials are not integrated with EDA.

An additional user account set-up is required for each user requesting EDM Contract Pay and/or Vendor Pay Documents which is performed by the EDM/EFR Help Desk.

EDM/EFR Access Process



EDA users with the EDM Contract Pay and/or Vendor Pay role will be presented with the EDM/EFR Document link on EDA's Document Selection Screen which *redirects* the user to the EDM/EFR system. Link takes the user to the front page of the EFR system where the user is prompted for EFR credentials.

EFR is not part of EDA, it is a DFAS owned and operated system. All issues with EFR access should be redirected to the EDM/EFR Help Desk at cco.edm-helpdesk@dfas.mil.

***Let's look at the
process...***

EDM/EFR Access Process



The user requires a separate username/password to access EFR since EDM/EFR is a separate system and access credentials are not integrated with EDA.

An additional user account set-up is required for each user requesting EDM Contract Pay and/or Vendor Pay Documents which is performed by the EDM/EFR Help Desk.

Let's Take a Closer look at the Steps...

EDA POC Approval Process

THE Approval Process...

1. **EDA POC Approves** registration. EDA POC must answer 'auditor' question for EDM/EFR access



2.

EDA

- Builds EDM/EFR request record
- Sends notification to EDM/EFR Help Desk
- Adds User to EDA & allows EDA access
- Audits access & test activities



EDM/EFR Help Desk

Opens e-mail

- Contacts User/EDA POC
- Verify Request
- Validate Access



Log on

**Enter
EDA**

Perform Account Administration to process EDM/EFR Access Request

4.



EDM/EFR Set-up Process

THE Approval of EDM/EFR...

1. **EDM/EFR Help Desk**
Approves/Deletes Contract Pay or Vendor Pay Access requests in



EDA

2.
 - *Audits EDM/EFR access*
 - *If Approved - Grants roles to User*
(user sees EDM/EFR Document link on document selection)

EDM/EFR Help Desk

3.
 - **Distributes EDM/EFR Username/Password**
 - **Assists User as required**



User Logs into EDA
with EDA
Username/Password

4. **User Clicks EDM/EFR Documents link**
EDA Redirects to EDM/EFR Web Page

User Logs into EDM/EFR
With EDM/EFR Username/Password

Modify Existing User Access

To Modify an existing User...

1. **EDA POC** *Initiates* change to user Account. EDA POC must answer 'auditor' question for access



EDA

2.
 - *Builds* EDM/EFR request record
 - *Sends* notification to EDM/EFR Help Desk
 - *Adds* User to EDA & allows access
 - *Audits* access activities



EDM/EFR Help Desk

opens e-mail

- **Contacts User/EDA POC**
- **Verify Request**
- **Validate Access**



Log on

**Enter
EDA**

Perform
Account
Administration to
process EDM/EFR
Access Request

4.



Modify for EDM Access

Modify User Account for EDM/EFR Document Access

EDM/EFR is a separate system.

A New EFR username/password is required...THEREFORE, A mechanism to generate an EDM access request is available. The request triggers the EDM/EFR Help Desk to process and distribute new access credentials.

You cannot simply "Check" Contract Pay and/or Vendor Pay roles.

SET-UP in EFR is required prior to accessing Contract Pay and/or

Documents	<input checked="" type="checkbox"/> Contracts <input type="checkbox"/> DD1716s <input type="checkbox"/> Government Transportation Requests (GTR)
<input type="checkbox"/> Universal Voucher Access <input checked="" type="checkbox"/> Accounting Vouchers <input checked="" type="checkbox"/> Travel Vouchers <input checked="" type="checkbox"/> Military Pay Vouchers <input type="checkbox"/> Commercial Pay Vouchers	<input type="checkbox"/> Freight GBLs <input type="checkbox"/> Personal Property GBLs <input type="checkbox"/> Non-Automated GBLs <input type="checkbox"/> Electronic 110s <input type="checkbox"/> Signature Cards
<input type="checkbox"/> EDM - Contract Pay Documents <input type="checkbox"/> EDM - Vendor Pay Documents Request Access to EDM Document types	

EDM/EFR Help Desk services these additional requests and finalizes the role within EDA. Processing the request 'toggles' the role on in EDA.

Request/View EDM Access

The EDM Role display on the Modify Screen will vary based on current options and in-progress status of requests

You cannot "Check" the role(s)

Permissions	
<input type="checkbox"/> Contracts	<input type="checkbox"/> DD1716s
<input type="checkbox"/> Accounting Vouchers	<input type="checkbox"/> Government Transportation Requests (GTR)
<input type="checkbox"/> Travel Vouchers	<input type="checkbox"/> Freight GBLs
<input type="checkbox"/> Military Pay Vouchers	<input type="checkbox"/> Personal Property GBLs
<input type="checkbox"/> Commercial Pay Vouchers	<input type="checkbox"/> Non-Automated GBLs
<input type="checkbox"/> EDM - Contract Pay Documents	<input type="checkbox"/> Electronic 110s
<input type="checkbox"/> EDM - Vendor Pay Documents	<input type="checkbox"/> Signature Cards

Click "Request Access to EDM Document types"

ONLY Request

☐ EDM - Contract Pay
EDM Vendor Pay request Pending
[Request Access to EDM Document types](#)

**Vendor Pay
Pending**

EDM - Contract Pay access request pending
☐ EDM - Vendor Pay
[Request Access to EDM Document types](#)

**Contract Pay
Pending**

EDM Contract Pay request pending
EDM Vendor Pay request pending

**Both roles Pending
No request capability
Only one request per**

☐ EDM Contract Pay
☒ EDM - Vendor Pay
[Request Access to EDM Document types](#)

**Vendor Pay Role
Request Contract**

☒ EDM - Contract Pay
EDM Vendor Pay request pending

**Contract Pay Role
Vendor Pay**

☒ EDM - Contract Pay
☒ EDM - Vendor Pay

**Vendor Pay Role
Contract Pay Role
No Request**

Pay

Pending

capability



Generate Request for EDM²⁸ Access

Generate EDM Access Request

[Document Selection](#) > [Account Admin](#) > Generate EDM Access Request

This screen is used to request access to documents stored on the Electronic Document Management (EDM) Electronic File Room (EFR) system.

- Requests for access to the EFR system are subject to approval by the EDM help desk.
- You MUST indicate whether or not the user is an auditor.

Select the EDM document types you want Carol Flaherty to access:

☐ Contract Pay Documents
List desired Contract Pay sites (for example: North, West, South)

☐ Vendor Pay Documents
List desired Vendor Pay sites (for example: Columbus, Omaha, Charleston)

Is this user an Auditor? ☐ Yes ☐ No

Click
**Vendor
Pay
AND/OR
Contract
Pay**

Auditor?

Click

**Enter Site
Information**
**Enter Site
Information**

EDA sends notification to the EDM/EFR Help Desk and builds the EDM Access Request for action by the EDM/EFR Help Desk

EDM/EFR Help Desk services these additional requests and finalizes the role within EDA. Site information is used by them in establishing access into EFR